

# **Make It Easier To Do Business/Customer Focus Subcommittee**

## **Public Session**

**Monday, May 19, 2014**

**Rhode Island Commerce Corporation  
315 Iron Horse Way, Providence, RI**

**The following were in attendance:**

**Appointees/Delegates**

*Karl Wadensten (Chair)  
George Nee  
Roland Fiore  
Tim Hebert*

**RIEDC Staff**

*John Pagliarini  
Christopher Cannata  
Lori Bassett*

**Department of Regulatory Reform**

*Nancy Scarduzio*

**Others**

*Malcolm Baxter*

Mr. Wadensten called the meeting to order at 4:07PM and thanked everyone for coming. Minutes from the 4/21/14 meeting were approved unanimously.

Mr. Cannata gave an update on the CRM system. At the moment there are 25 users and we currently have 900 accounts in the system; the focus is at this time is on data integrity. There are 240 "opportunities" in the system - clients that the staff is currently engaged with. These opportunities include loans, expansions, start-ups, etc. Mr. Cannata noted that we are at approximately 50-60% of the capability of the system and he would like to tap in to more facets such as campaigns and marketing related functionality. We still have approximately ten hours of consulting time left but Mr. Cannata is saving that for customer satisfaction surveys.

Mr. Wadensten inquired about the 25 users. They are from the following groups:

Business Development  
Client Services  
Renewable Energy  
Finance  
PTAC  
STAC  
International Trade

Mr. Hebert stated that we need a higher level executive push to make this integral to the day to day operations. Mr. Pagliarini stated that there is an upcoming all-staff meeting that will promote this.

Mr. Hebert would like to expand the scope and get other state agencies involved. More conversation took place regarding this idea. Mr. Nee suggested the Governor gather all the Directors of the various agencies so that their different CRM systems can be discussed and compared. Mr. Wadensten suggested a “we can help” tactic for bringing other agencies on board with this system.

Mr. Hebert stressed the importance of the following:

- Executive sponsorship
- Survey information
- Helping first time callers

Mr. Cannata noted that the behavioral modification that this system has brought about is significant. Mr. Pagliarini asked Mr. Cannata to explain how an inquiry is handled. He explained that when a call comes in a response takes place immediately; an extreme effort is made to accommodate concerns and questions as soon as possible. Most calls involve financing related information, resources, technical assistance, and other general inquiries. He also noted that all Client Services team members are familiar with the incumbent worker training program. Ms. Scarduzio noted that she has given points of contact for the various agencies involved with permitting to help the Client Services Team better serve their clients.

Mr. Nee asked if we had contacts for all the various cities and towns. Mr. Pagliarini pointed out that the Secretary of State’s Office has a handbook available with this information. Ms. Scarduzio noted that she has a more in-depth list available.

Mr. Nee inquired about the economic development directors for the municipalities. He suggested that CommerceRI have a meeting with these people to establish lines of communication.

Mr. Fiore brought up issues with local municipalities. More conversation followed about how these concerns can be addressed without encroaching on local control.

It was noted that we are six months away from a new Governor and new Cabinet Members. A suggestion came up about meeting with the gubernatorial candidates but it was decided that it might be better to wait until after the primaries, during the transition period.

Mr. Wadensten asked how we could get “faster traction” for this group. Mr. Pagliarini suggested getting in touch with Dan Beardsley, Executive Director of the Rhode Island League of Cities & Towns. Mr. Pagliarini will reach out to him and plan an informal meeting with the group.

Ms. Scarduzio noted that they are working on getting e-permitting in place; it has gone out to bid.

The meeting adjourned at 4:59PM.

DRAFT